



Foreign Agricultural Service

**GAIN Report**

Global Agriculture Information Network

Required Report - public distribution

Date: 8/1/2000

GAIN Report #TU0035

## Turkey

## Livestock and Products

## Annual

## 2000

Approved by:

**Susan R. Schayes, Agricultural Counselor**

**U.S. Embassy, Ankara**

Prepared by:

A. Ünal Sarigedik, Agricultural Specialist

---

### Report Highlights:

**The Government of Turkey ended a three year ban on breeder cattle imports last August, but has maintained import restrictions on meat and slaughter cattle. Several of the farms which received import permits since that time have imported registered dairy cattle from European suppliers. Producers are hoping that the Government's new Livestock Development Program will provide additional incentives and support. Privatization of TIGEM farms could provide opportunities for joint ventures in Turkey's livestock sector.**

---

Includes PSD changes: Yes

Includes Trade Matrix: Yes

Annual Report

Ankara [TU1], TU

Executive Summary .....	1
Production .....	3
Livestock Development Program .....	4
Other Development Initiatives .....	5
TIGEM Farms .....	5
Consumption .....	6
Trade .....	6
Stocks .....	7
Policy .....	7
Trade Policy .....	8
Marketing .....	9
Statistical Tables .....	10
PSD Table Animal Numbers, Cattle .....	10
PSD Table Meat, Beef and Veal .....	11
Export Trade Matrix for Animal Numbers, Cattle .....	12
Import Trade Matrix for Animal Numbers, Cattle .....	13
Export Trade Matrix for Meat, Beef and Veal .....	14
Import Trade Matrix for Meat, Beef and Veal .....	15
Feed Demand Strategic Indicator Table .....	15

## Executive Summary

Cattle production occurs throughout Turkey. Even though most cattle are dual purpose animals, cattle in eastern Turkey generally are grazed on public rangeland and tend to be raised for beef production, while cattle in western Turkey are fed more grains and mixed feeds and tend to be raised for milk production. Less than half the herd consists of native breeds. About fifteen percent are imported purebred cattle and the remainder comprise a variety of crossbred cattle.

The total ban on imports was relaxed last August. Dairy farmers with facilities but insufficient cattle, can apply to the Ministry of Agriculture and Rural Affairs (MARA) for breeding cattle import licenses. However, in attempt to keep imports under control, the Ministry is only considering applications from large farms which require at least 100 head. The GOT is not providing credits or subsidies to importers who are using other commercial sources. Seventeen farms received import licences since the ban was lifted, for a total of about 7,000 head of breeding cattle. In addition, the MARA's General Directorate of Organization and Support Services has started to provide permits to Village Development Cooperatives for tenders to procure dairy and/or dual purpose breeding cattle either from the domestic market or abroad.

The Minister of Agriculture recently announced that a revised Livestock Development Project will start this year and that TL 46 trillion (about USD 70 million out of the total budget requirement of USD 1.3 billion) was set allocated to the Project. A regulation which defines the program and describes how farmers and others will benefit from the program, was published on June 2, 2000. Another regulation was published on June 4, 2000, requiring that all large ruminants have I.D. certificates and ear tags, so that their movement, sale, and slaughter can be monitored.

The Turkish High Planning Board recently approved privatization of State-owned TIGEM farms. Ten (eight of them fully and two partially) of the total 37 TIGEM farms can be operated under joint ventures with the private industry. The primary aim of the privatization effort is to improve the farms' efficiency and yields. If the government follows through on its announced plans to privatize these farms, they can offer an excellent platform to raise Turkish private sector production to Western norms.

There are no high quality beef breeding cattle in Turkey, although the demand for high quality beef is increasing in response to a growing tourism sector. To introduce Turkish officials and producers U.S. beef breeds and to demonstrate their productivity under Turkish conditions, USDA is providing a commercial operation with thirty head of U.S. beef breeding cattle through its Quality Samples Program. The animals are expected to arrive late August.

There are no duties on breeding cattle imports. Duties are 141 percent for feeder and slaughter cattle and 235 percent for beef and veal. However, import licences are only available for breeding cattle.

Livestock statistics are the subject of much debate in Turkey, although the trend toward declining herd size is clear. It is generally assumed that official statistics (registered slaughter from the large commercial processing facilities) account for about seventy percent of total production and thirty percent for unregistered production. However, since commercial operations have an incentive to under report slaughter to avoid taxes, an even larger percent of meat production may go unregistered. Beef and veal production statistics are equally uncertain. Production estimates used in this report are based on the above assumptions.

## Production

Cattle production occurs throughout Turkey. Most cattle are dual purpose animals. Cattle in eastern Turkey generally are grazed on public rangeland and tend to be raised for beef production (with milk production used mainly for home consumption), while cattle in western Turkey (where the bulk of the grain is grown) are fed more grains and mixed feeds and tend to be raised for milk production. Less than half the herd consists of native breeds. About fifteen percent are imported purebred cattle and the remainders comprise a variety of crossbred cattle. There has been a trend toward increased numbers of purebred and crossbred cattle.

Turkey used to maintain large numbers of cattle and sheep--about 16.6 million cattle and buffalo, and 65 million sheep, ordinary goats and Angora goats-- in mid 1970's. Since then, however, their numbers have significantly declined. The primary reason was the unsettled situation in eastern Turkey, where the bulk of the beef, veal, lamb, mutton, and goat meat were produced. Political, economic and social problems in this area led to large scale urban migration and significant disruption to livestock production.

There are several other reasons for the decline in numbers and/or yields. Although most domestic breeds are well-adapted to local conditions and are considered dual purpose animals, the genetic base of domestic breeds cannot compete with the meat and milk yields of western breeds. Some sources estimate the cow/calf ratio as 65 percent, meat yields of Turkish cattle at around 150 kilograms, and average cow milk yields at around 2,000 MT. Even though these are improving in recent years as livestock activities shift to Western Regions, they are still very low. Yield losses are further aggravated by financial difficulties which cause farmers to sell or slaughter calves at a very early age, despite government incentives.

The Turkish herd experiences a high incidence of disease and mortality, and a low fertility rate. Because of its geographical location, Turkey is very susceptible to a variety of the contagious animal diseases due to contacts with cattle from neighboring countries- Foot and Mouth (FMD) disease being the most prevalent. One of the GOT's justifications for banning livestock imports was an outbreak of FMD in the Thrace area in the spring of 1996. Imported cattle were considered to be extremely vulnerable and more at risk to infection and to spread the disease more rapidly. Although the FMD outbreak in Thrace was brought under control by December 1996, the ban was extended for three month periods through August 1999. In August 1999, the Agriculture Minister announced that he would allow breeder cattle imports, but the ban remained in place for feeder and slaughter cattle, and beef imports.

The Government has maintained strict controls on imports and will only accept applications for import permits from dairy and meat producers who can manage imports of at least 100 head of breeding cattle at a time (reportedly to monitor the imports, prevent disease, and keep out imports of slaughter and/or poor quality stock). The GOT is not providing direct supports for the imports, but farmers may use other credit sources, such as GSM-103 or Hermes. Since last September, 17 commercial farms received import licences for a total of about 7,000 head of breeding cattle. Of this total, 770 head (420 head from Germany and 350 head from Denmark --before the BSE outbreak announcement) were imported. To decrease financial requirements from Treasury, the MARA is not planning to directly import and distribute breeding cattle, as was done in the past.

The MARA's General Directorate of Organization and Support Services has also started to provide permits to Village Development Cooperatives (VDCs) for tenders for dairy and/or dual purpose breeding cattle, such as Holstein Friesian, Brown Swiss or Simmenthal. Some of the VDCs are procuring cattle from local sources, mostly from the members of the National Breeders Association. However, some VDCs are announcing tenders for imports, which has served to encourage other farm organizations to consider similar programs. For instance, Agricultural Credit Cooperatives are also trying to get a similar type of permission for the needs of their member farmers.

Animal nutrition in Turkey is generally poor. Unless fed in commercial feedlots (most cattle and sheep are not), rations often are inadequate. Most cattle and sheep generally are grazed on public lands on a first-come first-serve basis, and provided with little or no additional supplements. Supplemental feeding of forages is limited because government production policy favors field crop production. Because grazing is unregulated, public lands tend to be severely over grazed which only further aggravates the problem. The GOT has been trying to control the problem. Three years ago it passed a Meadow Law to regulate and improve public pastures and meadows, but funding and implementation have been slow. In recent years there has been a trend toward raising cattle in open-air commercial feedlots in Western Turkey.

A massive government project to support all forms of livestock activities had been prepared by the previous Government (national elections were held last year) to revitalize the livestock sector (Livestock Development Project-LDP) and was recently adopted by the current Administration. Production of cattle, for dairy and beef, using locally available and imported animals was the most important component of the project. If this five-year program is funded sufficiently, the LDP can reverse the declining trend of the livestock production. The project, however, is not expected to operate fully in the short run due to its large financial requirements and tight budget policies.

### **Livestock Development Program**

The Minister of Agriculture recently announced that a component of LDP will start this year. TL 46 trillion (about USD 70 million out of the total need of USD 1.3 billion) from the budget was set aside for the first year of the Project. A regulation which describes the potential benefits and initial program targets to implement the program was officially published on June 2, 2000 as follows:

- a) Fodder crop production incentives: Approved, fodder crop production projects will receive support for up to 30 percent of investment and operation costs for multi year fodder crops (from 1 to 50 hectares) and 20 percent for one year fodder crops (2.5 hectares to 100 hectares). Certified fodder crop seeds must be used. Priority will be given to fields where tobacco and sugar beets were previously grown.
- b) Cattle breeding incentives: Farmers will receive support for 30 percent of their costs for pedigreed cattle and 15 percent for cattle with purebred certificates from TIGEM and/or private growers. Each grower or enterprise may receive supports for maximum of 50 head. A maximum of 100,000 head of breeding cattle will be supported over five years.
- c) Artificial insemination incentives: The support is 50 percent of the cost for those farms having pedigrees in areas considered less developed areas and 25 percent for other farms and regions. A maximum of 10,000,000 cattle will be supported over five years.
- d) Incentives for newly established artificial insemination enterprises: Newly established artificial insemination enterprises will receive 50 percent of their investment costs if they are established and operating in less developed areas or 25 percent for other areas. A maximum 2,000 artificial insemination enterprises will be supported in five years.

### **Other Development Initiatives**

The GOT also established a Dairy Council of government and private sector representatives under the Chairmanship of the MARA Undersecretary, to establish a plan to eliminate the marketing problems of milk producers. In a related program producers will receive premiums and other incentives to increase production and sell to modern processing facilities.

The uncontrolled movement of animals in Turkey has created many problems and contributed to the spread of diseases to non-affected areas. To combat these problems and monitor movement within Turkey, the GOT published another regulation on June 4, 2000 which requires all large ruminants to have I.D. certificates and ear tags. Once the program is implemented (and this is expected to take time, as it is only an initial effort) it will also be easier to trace the cattle when they are sold or slaughtered.

The Turkish livestock industry as a whole continues to face a combination of natural and man-made challenges. Efforts to support crop production (and particularly the rural farm sector) have resulted in domestic grain prices which are considerably above the world market prices and had a direct impact on feed costs. Also, Turkey's import policy did not encourage the introduction of new technology. As a result, the industry has been slow to modernize. Smuggled cattle from border trade with Turkey's Eastern and Southern neighbors, mainly from Iran, met part of the nation's need for beef but, at the same time, kept meat prices lower than they would have otherwise been and discouraged feedlot production. In September 1999, the MARA announced that it would stop all illegal border trade of agricultural commodities and took severe measures to eliminate smuggling. This step is considered essential to develop a profitable domestic industry.

A number of large private companies are showing renewed interest in livestock production. One of the country's largest groups is developing a 100 hectares farm in Southeastern Turkey for dairy and beef cattle with vertical integration of a feed mill, milk and meat processing plants. Another large group has developed initial plans for a huge agro-techno park in the same region, which will support activities in several industries, including crops and livestock. One of the aims of Turkey's massive Southeastern Anatolia Project (GAP) is to reverse the situation by improving economic conditions and bring stability to Eastern and Southeastern Turkey. The livestock industry is expected to be one of the major beneficiaries of the project. However, the project is behind schedule and the extent of implementation and the timing of its livestock sector components are difficult to determine.

### **TIGEM Farms**

The High Planning Board recently made a decision to privatized ten (eight of them fully and two of them partially) of the 37 TIGEM farms and to allow joint ventures with private industry in order to improve their efficiency and yields. TIGEM farms account for less than one percent of the total dairy population (less than one percent), and were designed to serve as a kind of model for dairy production through use of modern production techniques, high energy and protein feed mixes that take advantage of locally produced and imported products, and track each animal's performance. If the Government follows through on its announced plans to privatize these farms, they may offer the best platform for bringing Turkish private sector dairy production up to Western norms. A USA funded study, produced last year, identifies the TIGEM farms which could be developed to produce beef cattle in accordance with U.S. production model.

## Consumption

According to the 1997 census, 65 percent of Turkey's population now lives in urban areas and 35 percent in rural areas. The meat consumption pattern has shifted from lamb, mutton, and goat to greater consumption of beef, veal and poultry due to costs, and changing tastes. Although the migration pattern was mostly from the main sheep-raising areas in eastern Turkey to the large urban areas of western Turkey, including Istanbul, Ankara, and Izmir, increases in beef consumption were limited by a high rate of inflation and restrained incomes.

Most of Turkey's commercial slaughter houses and packing plants are now privately owned. The Meat and Fish Corporation (EBK), the only remaining public sector company, was a major player in the past but now handles less than five percent of production. Most of EBK's plants have been privatized and the remainders are expected to be privatized in the near future.

Beef prices increased by about forty percent this year, significantly lower than the rate of inflation which is running around fifty-five percent. The retail price of deboned beef is about TL 4,500,000 (\$7.15) per kg, chopped beef is about TL 5,000,000 (\$7.95) per kg, and tenderloin and other higher grades of beef are about TL 5,500,000 (\$8.75) or higher per kg (USD 1.00= TL 630,000 as of 7/31/00). Meat prices have not increased further in recent years because of the large numbers (believed to be hundreds of thousands) of feeder and slaughter cattle coming through border trade and/or smuggled to Turkey from eastern and southern borders, primarily from Iran.

## Trade

Our MY2000 PS&D estimate for cattle imports has been reduced to 5,000 head. The number is expected to increase to 25,000, including 5,000 from the U.S., in 2001, assuming that the government implements policies which promote the sector. PS&D beef import estimate for MY2000 and forecast for MY2001 both continue to be zero.

In the first half of the 1990's, Turkey was a major cattle importer, as domestic cattle numbers declined while demand remained strong. Turkey continued to import cattle and beef until the August 1996 when the GOT announced a ban which brought both livestock and beef imports to a halt. The ban was renewed every three months until August 1999 when the ban was partially lifted for breeding cattle.

Farmers and dairy producers who have facilities and want to import 100 head or more of breeding cattle can apply to the MARA for import permits. Since last September, a total of 17 commercial farms were given permits for about 7,000 head of breeding cattle. Out of this total, 770 head (420 head from Germany and 350 head from Denmark--before the BSE outbreak announcement) have been imported so far. The low rate of imports reflects mixed signals which the Agriculture Ministry has been sending to the importers. Unlike previous livestock import programs, the GOT has not provided importers with incentives or subsidies to support their import/distribution programs.

Germany has been the most significant supplier of breeding cattle for Turkey. A number of producers have shown an interest in importing high quality dairy and meat cattle from the United States, but have been discouraged by the higher costs of the U.S. animals. While recognizing that high quality genetics would be beneficial to the industry, they have decided to limit their expenses by opting for lower quality, lower cost cattle. German cattle can be shipped by road in smaller lots and benefit from a large EU subsidy, in addition to some credit guarantees.

Despite the obstacles, a number of potential importers, who are interested in higher quality U.S. heifers, are continuing



discussions with the U.S. suppliers. A seven year GSM-103 export credit guarantee program is available for U.S. cattle imports. The 2001 program is likely to be announced at the initial 2000 level, \$40 million, and may also include coverage for freight costs. Turkish Minister of Agriculture has already stated at several occasions that he will give the permission only for the imports of registered (pedigreed) cattle.

The EU has been putting heavy pressure on Turkey to lift the ongoing beef import ban so that it can capitalize on a bilateral agreement implemented in May 1998 which included 19,000 MT reduced duty quota for EU beef sales to Turkey. Little progress has been made on the issue, although the EU levied continues to threaten trade sanctions. Turkey has also signed trade agreements with Romania (1,000 MT reduced duty TRQ for beef and 5,500 head reduced duty TRQ for feeder cattle) and Hungary (500 MT TRQ for beef and 4000 head TRQ for feeder cattle), but the concessions have not yet been implemented.

Both the IMF and the World Bank have support programs and agreements in place with the Government of Turkey which could effect livestock production, both directly and indirectly. The Bank is actively supporting a trial program of direct income supports for small farmers to decouple agricultural supports from domestic purchase prices. Following its IMF agreement and anti-inflation efforts, the Government announced slightly lower increases in domestic support prices for grains for the 2000 marketing year. Both organizations are promoting the privatization of State Enterprises and Banks.

## Stocks

Stock levels are limited because of the Turkish preference for fresh meat. Official statistics are not available and PS&D estimates were therefore derived from the "best" estimates from a wide variety of sources.

## Policy

(also see Production)

Meat marketing in Turkey has been in transition as new government programs and regulations were phased in, aimed at increasing private sector involvement in marketing and pricing over the last decade. Some of these programs designed to address basic production problems included, subsidized production credit for improving animal nutrition and genetics, as well as encouraging joint ventures and technology transfer through various incentives. The government has also continued to facilitate efforts to eradicate diseases and directly involved in subsidizing fodder crop and breeding cattle production and artificial insemination activities.

The GOT efforts to play a more expansive role in assisting the development of the industry have been hampered by funding problems. Recent governments have tried hard but were not successful to find funds for the massive Livestock Development Project which was initially announced as a \$1.3 billion project in five years. The Minister of Agriculture recently announced that LDP will start this year and TL 46 trillion (about USD 70 million) from the budget was set aside for the Project this year.

The GOT also decided to provide funds to the Village Development Cooperatives (VDCs) to support tenders for dairy and/or dual purpose breeding cattle, such as Holstein Friesian, Brown Swiss or Simmenthal. Under two scenarios, up to 100 farmers will be provided two breeding cattle each, or fifty farmers will receive four cattle each (a total of 200 cattle per VDC). Some of the VDCs are procuring cattle from local sources, mostly from the members of the National



Breeders Association. Others are announcing tenders to import their breeding cattle needs. Agricultural Credit Cooperatives are also trying to get a similar type of permission for the needs of their member farmers.

In addition to these programs, the GOT set up a Dairy Council to eliminate the marketing problems of milk producers. Relevant government and private sector representatives were planned to meet regularly under the chairmanship of the Undersecretary of the MinAg in order to solve these problems. Producers were also provided incentives to produce more milk and sell to modern processing facilities by additional premiums.

The Ministry of Agriculture has also, with German aid, been working to organize and expand livestock breeding associations and is currently developing a program which will computerize the registration of pedigreed cattle throughout the country.

### **Trade Policy**

The trade policy of the GOT has historically “encouraged” the development of the domestic meat and dairy product sectors by maintaining very high duties on import of meat and dairy products. Turkey charges much lower duties on inputs that it considers as vital to these industries, such as breeding cattle and genetics which are zero.

The EU and Turkey implemented a bilateral agreement in May 1998 under which Turkey would provide the EU with improved access for cattle, beef and dairy products. Under the agreement, Turkey would provide the EU with permanent zero duty access for breeding cattle, 19,000 MT in beef tariff rate quotas at an eventual duty of 42 percent, and small tariff rate quotas for various dairy products. However, under pressure from Turkish private sector interests, the Ministry of Agriculture refused to issue licenses for the import of beef under the agreement. Turkish agribusiness leaders have expressed concerns that these will be the first of the further concessions that Turkey will have to make to the EU in coming years as part of its effort to get full membership in the European Union.

The Government’s policy on cattle and sheep exports remains generally the same. Slaughter male or infertile female cattle (local breeds weighing an average of 225 kilograms and crossbreeds weighing an average of 300 kilograms) may be exported any time with an export license from the Ministry of Agriculture.

The import duty rates for breeding, feeder, and slaughter cattle and beef are provided in the following table.

<b>Tariff Number</b>	<b>Product Description</b>	<b>Import Duty</b>	<b>Other Information</b>
0102.10	Breeding cattle	0	For all origins

0102.90	Feeder and slaughter cattle	141% of the CIF value	The rate is 115% for Estonia, however, no import licences are provided
0201 & 0202	Fresh, chilled or frozen bovine meat	235% of the CIF value	The rate is 200% for Estonia, however, no import licences are provided

## Marketing

Livestock industry demand for breeding cattle will be strong for the next few years. If sufficient funds are provided for the LDP, market opportunities for cattle, genetics and feed will be much improved. Since the ban has been removed, large farmers and producers now can import breeding cattle, although only a handful actually finalized imports.

There are not any beef breed cattle in Turkey, but the demand for high quality beef is growing because of the growing tourism sector. A U.S. Quality Samples Program will introduce U.S. beef breeds (27 females and three bulls) to potential importers.

The GSM-103 program for Turkey was originally announced at USD \$40 million. The funds were shifted to support GSM-102 imports of other foods, when it was not used.. Other countries, have similar programs available for their exports. The Germans and other potential EU suppliers benefit from the use of EU subsidies and restitutions. Turks are generally familiar with the quality of U.S. cattle and growing numbers of producers are becoming interested in U.S. livestock, not only because of their genetic superiority but also due to concern over BSE problems in Europe.

A number of activities have been planned or have already taken place during the year aimed U.S. cattle sales to Turkey. These include visits by cattle exporters and associations, the continuing development of demonstration feedlots, and sales servicing in the form of local consultants who advise importers on animal nutrition and health issues. The U.S. Grains Council has been instrumental in organizing training programs for extension personnel as well as farmers. The American Soybean Association has organized Dairy Clubs in the Aegean and Marmara Regions. The National Renderers' Association also organized programs to introduce the consumption of yellow grease. A large number of Turkish officials and importers are interested in touring the States and visiting livestock producers, either through the Cochran Program or through market development activities on the part of FAS cooperators.

## Statistical Tables

### PSD Table Animal Numbers, Cattle

PSD Table						
Country	Turkey					
Commodity	Animal Numbers, Cattle				(1000 HEAD)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Total Cattle Beg. Stks	11610	11600	11550	11500	0	11350
Dairy Cows Beg. Stocks	4150	4150	4150	4150	0	4100
Beef Cows Beg. Stocks	3250	3250	3200	3200	0	3200
Production (Calf Crop)	4300	4300	4250	4250	0	4200
Intra EC Imports	0	0	0	0	0	0
Other Imports	25	0	50	5	0	25
TOTAL Imports	25	0	50	5	0	25
TOTAL SUPPLY	15935	15900	15850	15755	0	15575
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Cow Slaughter	0	0	0	0	0	0
Calf Slaughter	2100	2100	2100	2100	0	2100
Other Slaughter	2050	2050	2000	2050	0	2050
Total Slaughter	4150	4150	4100	4150	0	4150
Loss	235	250	200	255	0	225
Ending Inventories	11550	11500	11550	11350	0	11200
TOTAL DISTRIBUTION	15935	15900	15850	15755	0	15575
Calendar Yr. Imp. from U.S.	5	0	10	0	0	5
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

**PSD Table Meat, Beef and Veal**

PSD Table						
Country	Turkey					
Commodity	Meat, Beef and Veal				(1000 MT CWE)(1000 HEAD)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Slaughter (Reference)	4150	4150	4100	4150	0	4150
Beginning Stocks	57	57	71	52	0	47
Production	615	615	615	625	0	640
Intra EC Imports	0	0	0	0	0	0
Other Imports	19	0	0	0	0	0
TOTAL Imports	19	0	0	0	0	0
TOTAL SUPPLY	691	672	686	677	0	687
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Human Dom. Consumption	620	620	630	630	0	640
Other Use, Losses	0	0	0	0	0	0
TOTAL Dom. Consumption	620	620	630	630	0	640
Ending Stocks	71	52	56	47	0	47
TOTAL DISTRIBUTION	691	672	686	677	0	687
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

**Export Trade Matrix for Animal Numbers, Cattle**

Export Trade Matrix				
Country	Turkey		Units:	Head
Commodity	Animal Numbers, Cattle		Partial Begin	January 2000
			Partial End	March 2000
Exports for:	1999	2000	2000	2001
	Full	Full	Partial	Full
U.S.				
Others				
Total for Others	0	0	0	0
Others not Listed				
Grand Total	0	0	0	0

**Import Trade Matrix for Animal Numbers, Cattle**

Import Trade Matrix				
Country	Turkey		Units:	Head
Commodity	Animal Numbers, Cattle		Partial Begin	January 2000
			Partial End	March 2000
Exports for:	1999	2000	2000	2001
	Full	Full	Partial	Full
U.S.		30		5000
Others				
Gemany	0	4620		20000
Denmark	0	350		0
Total for Others	0	4970	0	20000
Others not Listed				
Grand Total	0	5000	0	25000



**Export Trade Matrix for Meat, Beef and Veal**

Export Trade Matrix				
Country	Turkey		Units:	Metric Tons
Commodity	Meat, Beef and Veal		Partial Begin	January 2000
			Partial End	March 2000
Exports for:	1999	2000	2000	2001
	Full	Full	Partial	Full
U.S.				
Others				
Serbia	30		9	
Georgia	2			
Liberia	1			
Unknown			5	
Total for Others	33	0	14	0
Others not Listed				
Grand Total	33	0	14	0

**Import Trade Matrix for Meat, Beef and Veal**

Import Trade Matrix				
Country	Turkey		Units:	Metric Tons
Commodity	Meat, Beef and Veal		Partial Begin	January 2000
			Partial End	March 2000
Exports for:	1999	2000	2000	2001
	Full	Full	Partial	Partial
U.S.				
Others				
Israel	1			
Total for Others	1	0	0	0
Others not Listed				
Grand Total	1	0	0	0

**Feed Demand Strategic Indicator Table**

(see the following page)

## FEED DEMAND

### STRATEGIC INDICATOR TABLE OF TURKEY

#### MEAT PRODUCTION

Country:				
Calendar Year:	Turkey 1998	Last Year 1999	Current Year 2000	Out Year Forecast 2001
Poultry				
Poultry Meat:	620,000	675,000	730,000	780,000
Eggs:	9,000,000	6,700,000	7,500,000	7,800,000
Pork:	0	0	0	0

#### COMPOUND FEED SECTOR

Country:				
Calendar Year:	1998	Last Year 1999	Current Year 2000	Out Year Forecast 2001
Compound Feed Capacity	11,228,000	11,714,000	12,300,000	13,000,000
Total Compound Feed Produced	9,500,000	10,000,000	10,500,000	11,000,000
----- by integrated producers	900,000	1,000,000	1,000,000	1,100,000
----- by commercial producers	8,600,000	9,000,000	9,500,000	9,900,000

#### FEED GRAIN USE

Country:				
Marketing Year:	1998	Last Year 1999	Current Year 2000	Out Year Forecast 2001
Corn (Domestic consumption: feed)	2,200,000	2,250,000	2,300,000	2,400,000
Other (Barley)	5,900,000	5,900,000	6,000,000	6,000,000
Other (Wheat)	1,000,000	1,000,000	1,000,000	1,000,000

#### PROTEIN - ENERGY USAGE

Country:				
Marketing Year:	1998	Last Year 1999	Current Year 2000	Out Year Forecast 2001
Total Protein Meal (feed waste domestic consumption)	1,650,000	1,820,000	1,915,000	2,030,000
Soy Bean Meal (feed waste domestic consumption)	490,000	600,000	640,000	700,000
Other Protein Meal, e.g. Sunflowerseed meal, cottonseed meal (feed waste domestic consumption)	1,100,000	1,150,000	1,200,000	1,250,000
Fish Meal	60,000	70,000	75,000	80,000
Palm Crude Oil (feed waste domestic consumption)	0	0	0	0

#### TRADE (in Metric Tonnes)

Country:				
Calendar Year:	1998	Last Year 1999	Current Year 2000	Out Year Forecast 2001
Corn				
Imports:	769,247	839,096	1,100,000	1,200,000
Exports:	9,759	6,205	10,000	10,000
Soy Beans				
Imports:	285,193	353,267	425,000	480,000
Exports:	4	107	0	0
Soy Bean Meal				
Imports:	390,234	520,549	600,000	660,000
Exports:	4,065	5,035	5,000	5,000
Fish Meal				
Imports:	41,958	58,809	65,000	70,000
Exports:	0	120	0	0
Palm Crude Oil				
Imports:	138,000	120,607	130,000	140,000
Exports:	0	0	0	0

#### PROTEIN PRODUCTS TARIFFS AND TAXES

Country:				
Report Year:				
0505.90	FEATHER MEAL	^ 30.8	4	
1501.00.00.60	YELLOW GREASE	' 15.6	4	
1502.00.00.40	INEDIBLE TALLOW	' 31.2	4	
1511	PALM OIL	' ' 31.2	12	
1518	ANML/VG FTS & OILS	' 28.8	21.7	
2301.10	MEAT AND BONE MEAL	' 4.3	2	
2301.20	FISH MEAL	' 4.3	2	

s:\analysis\other\rptrevw\rendpsi.wk4